



# Complete Guide to the Client Portal



1

# How to Log in to the Client Portal

## GETTING STARTED GUIDE

# The Client Portal

with  simplepractice

The SimplePractice Client Portal is a secure and easy way for you to communicate with your clinician, request appointments, sign documents, and even pay your session fees.

### SECTIONS:

1. How do I log in?
2. Troubleshooting
3. Online booking
4. Documents and forms

## HOW DO I LOG IN?

Before logging into the Client Portal for the first time, you'll receive a welcome email from your clinician that looks like this:

Hi Alice,

Your Appointment on Monday, September 30th at 11:15 AM (PDT) with Will Morales has been confirmed.

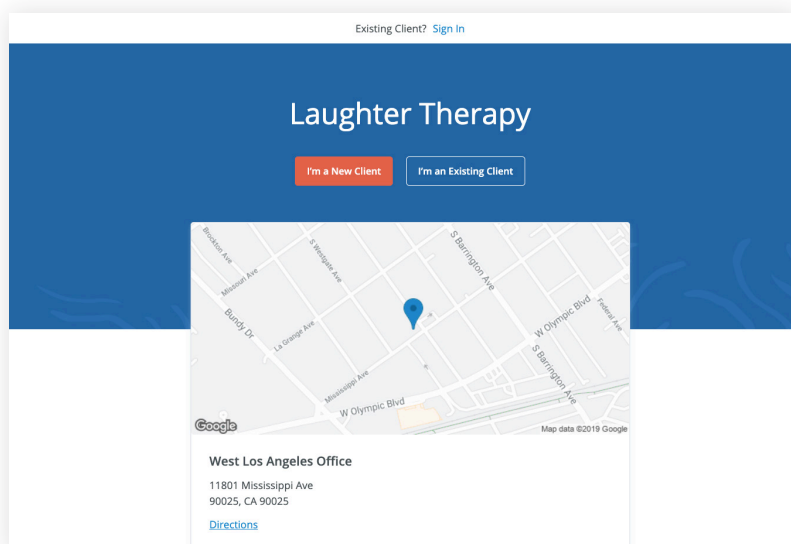
Before we meet, I would like you to review my practice documents and provide some information about yourself. This will help us get started.

Please click on this secure link below and login with the following:

Username: your email address

Password: 9029

[Click here to login to the client portal](#)



1. Click on the link the the **welcome email**.
2. You will arrive at the Welcome Page, where you can enter your **Username** and **Password**.
3. Enter your **email address** in the Email Address field and your **4-digit PIN number** from the email in the Password field. This is your temporary password.
4. You'll then be prompted to **create a password**.

5. Enter a new password, then re-enter it, and click Update. This will be your password moving forward, each time you access the Client Portal. **Be sure to remember it!**

6. You are now **logged in**.

You will now be able to login to the Client Portal at any time, using your email address as your username and the password that you created above.

Please create a password for your client portal account

\* Password

\* Password confirmation

Update


Tip: Bookmark this page, so you can log back in easily in the future.

## MINORS MANAGEMENT


If you are the guardian of a minor(s), and your clinician has given you access to their Client Portal (as well as your own), you will see icons after you log in. **Click on the profile** you want to manage.

PDR Clinic Sign Out

Hi Jane, which client would you like to manage?



Jane Smith



Becky Smith

## TROUBLESHOOTING

1. Check your **spam folder** and any other folders in your inbox for an email from the address [no-reply@simplepractice.com](mailto:no-reply@simplepractice.com). It also helps to add this address to your address book to make delivery easier.
2. If your clinician re-sends you an invitation, be sure to use the latest **4-digit passcode** to log in. Some email providers will collapse the emails into the same thread. Be sure to select the email that you received most recently. If you're not sure what your current 4-digit passcode is, your clinician can provide that info for you.
3. Be mindful of any **auto-fillers** enabled in your browser that might be entering information for you. If the auto-filler replaces the information you type, this will cause it to appear as inaccurate.
4. Double-check your **spelling**. Your login credential for access will be your exact email address—the same one where the invitation is delivered, so all spelling must be exact.
5. The same email can't be used for more than one portal account for the same clinician.

Tip: you only use the 4-digit passcode once. For each subsequent login, you'll use the new (8 or more digit) password that you created.

6. You can recover your password by clicking **"Forgot your password?"** below the Log in button. You'll be asked to enter your email address, and then you'll receive a password recovery email. Be sure to use the same email address that you normally use to log into your Client Portal, and check your spam

### Sign in to the client portal

Email Address

Password

Log in

Forgot your password?



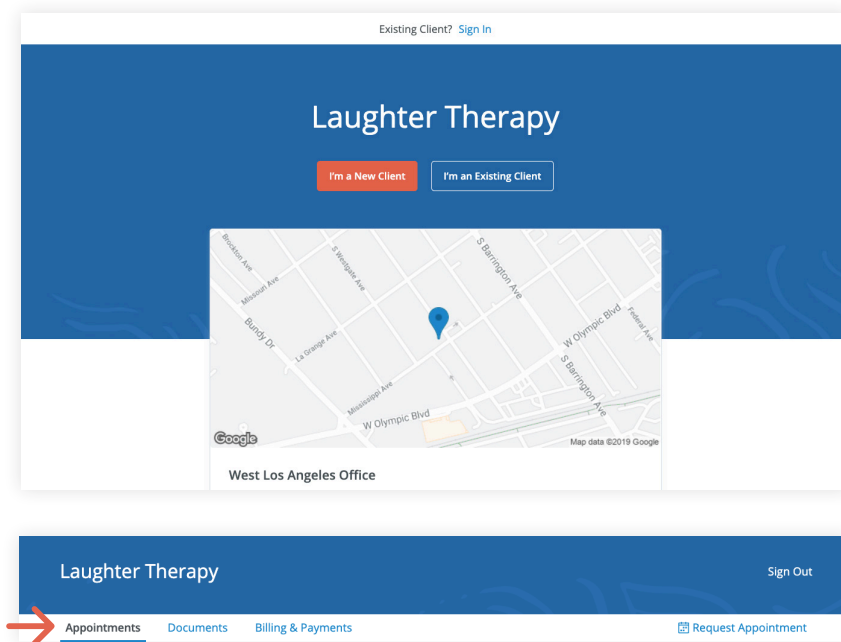
Are you a new client? [Request an appointment](#)

## ONLINE BOOKING

Online Booking lets you **request, cancel, or reschedule appointments** with your clinician. After submitting your request, you'll get a **confirmation email** once your clinician approves the appointment. If they are not able to see you at that time, they will send you a different email, which will let you request another time.

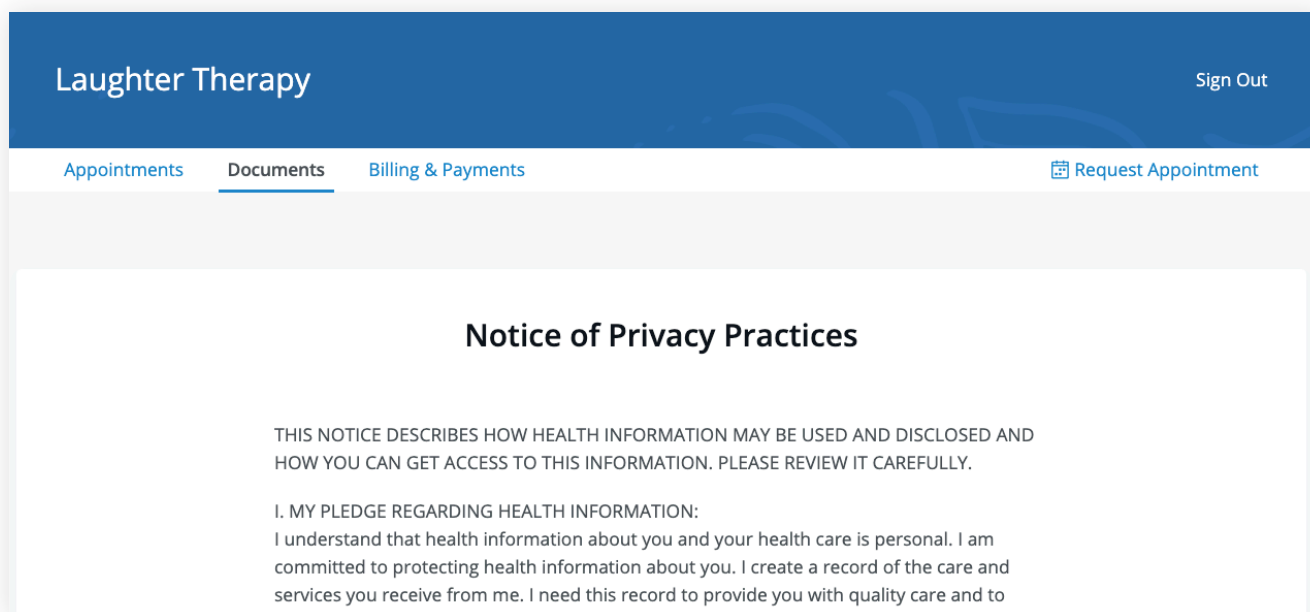
The following steps will show you how to request appointments.

1. Go to your clinician's Client Portal and click Existing Client to log in. (The New Client button is only for clients who have never logged into the Client Portal before).
2. Navigate to the appointments tab. (This may already be selected by default after you log in).



## DOCUMENTS AND FORMS

The first time you log into the Client Portal, you'll see a welcome message from your clinician. After you click **Get Started**, you'll start filling out forms from your clinician.



Some documents can be signed by clicking the **checkbox** at the end of the bottom of the page. Then, click **Continue** to move to the next document.

#### TELEPHONE ACCESSIBILITY

If you need to contact me between sessions, please leave a message on my voice mail. I am often not immediately available; however, I will attempt to return your call within 24 hours. Please note that Face- to-face sessions are highly preferable to phone sessions. However, in the event that you are out of town, sick or need additional support, phone sessions are available. If a true emergency situation arises, please call 911 or any local emergency room.

#### SOCIAL MEDIA AND TELECOMMUNICATION

Due to the importance of your confidentiality and the importance of minimizing dual relationships, I do not accept friend or contact requests from current or former clients on any social networking site (Facebook, LinkedIn, etc). I believe that adding clients as friends

I agree and sign this document

Submit & Continue

After signing documents, you may be asked to fill out your contact details, demographics, credit card, and insurance information.

## Contact Info

Autosaved at 4:27 PM on 09/27/2019

First name

Alice

Last name

Ko

Middle name

Preferred name

Client is a minor

Email address

emily+alice@simplepractice.com

Work 

It's okay to send me email

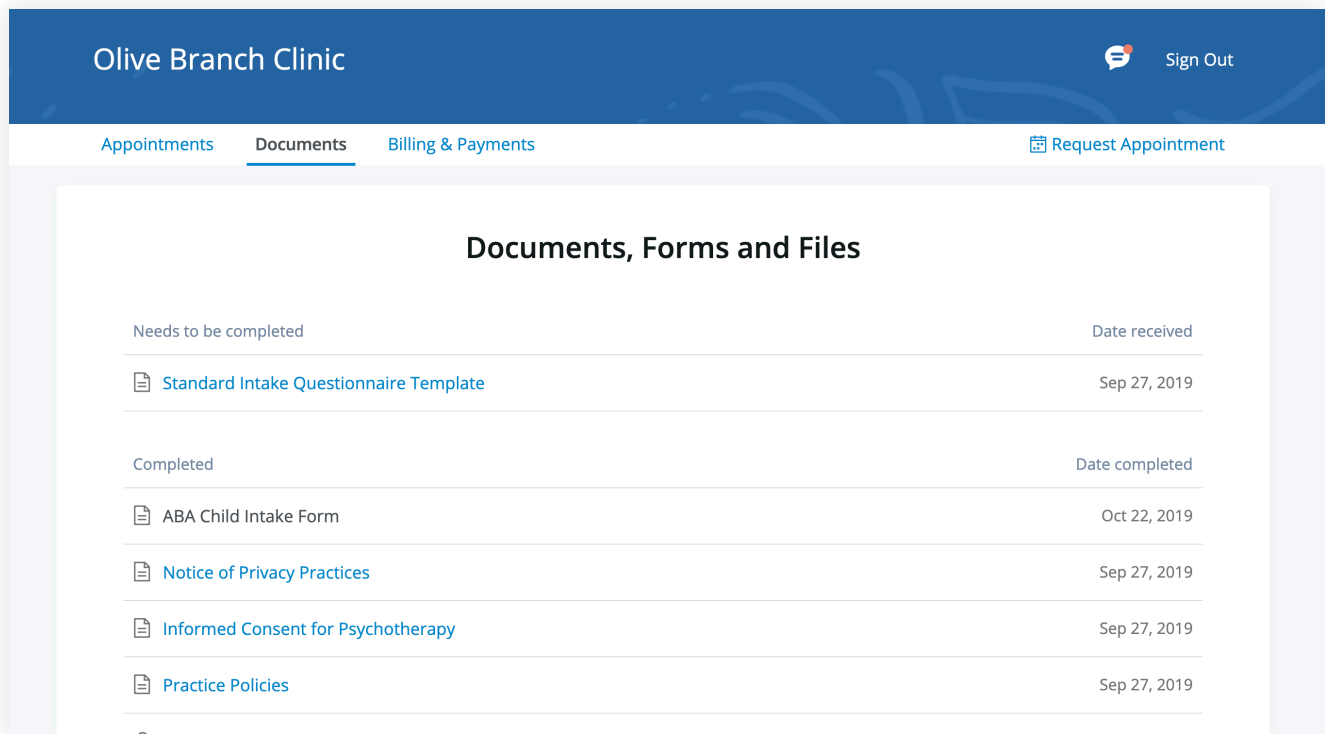
Send me email appointment reminders

Phone number

(949) 306-8945

Work 

To view your completed documents at any time, navigate to the **Documents** tab.



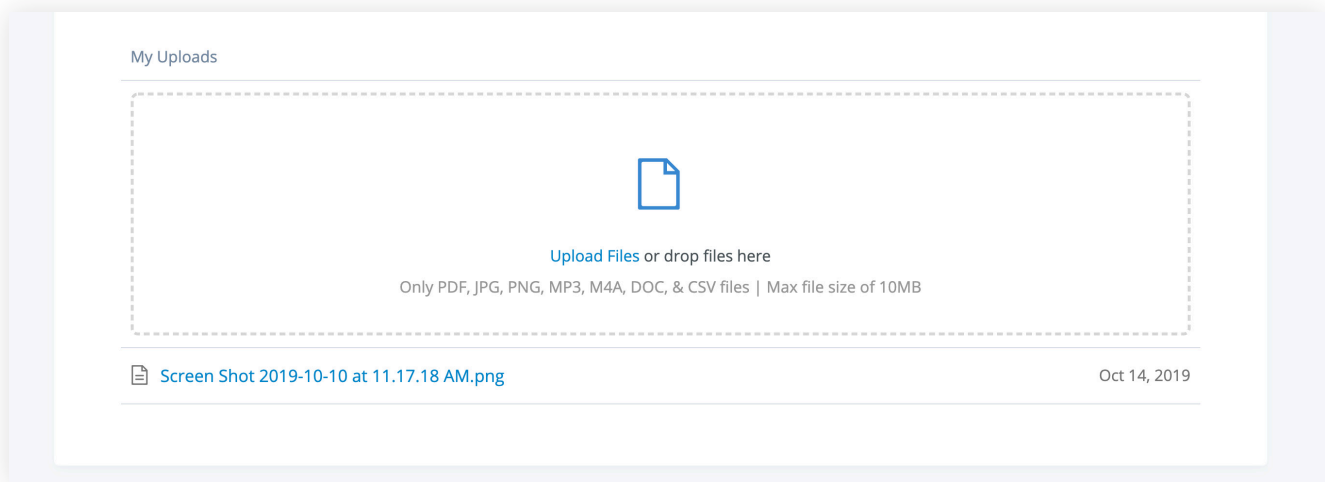
The screenshot shows the Olive Branch Clinic client portal. At the top, there is a blue header with the clinic name and a 'Sign Out' button. Below the header is a navigation bar with tabs for 'Appointments', 'Documents' (which is selected), and 'Billing & Payments'. A 'Request Appointment' button is also visible. The main content area is titled 'Documents, Forms and Files' and contains two sections: 'Needs to be completed' and 'Completed'. Each section has a table with document names and dates.

Needs to be completed	Date received
<a href="#">Standard Intake Questionnaire Template</a>	Sep 27, 2019

Completed	Date completed
<a href="#">ABA Child Intake Form</a>	Oct 22, 2019
<a href="#">Notice of Privacy Practices</a>	Sep 27, 2019
<a href="#">Informed Consent for Psychotherapy</a>	Sep 27, 2019
<a href="#">Practice Policies</a>	Sep 27, 2019

At the bottom of the **Documents** tab, you will be able to upload files to share with your clinician, including pdf, jpg, png, mp3, m4a, or csv files. You can click to view these at any time.



The screenshot shows the 'My Uploads' section. It features a large dashed box for file uploads with a document icon in the center. Below the box, it says 'Upload Files or drop files here' and lists supported file types: 'Only PDF, JPG, PNG, MP3, M4A, DOC, & CSV files | Max file size of 10MB'. Below this, there is a table showing one uploaded file.

My Uploads	
<a href="#">Screen Shot 2019-10-10 at 11.17.18 AM.png</a>	Oct 14, 2019



**Congratulations!**

You're now ready to start using your Client Portal.



# Secure Messaging

with  simplepractice

Secure Messaging lets you send and receive messages directly with your clinician. Reschedule your session or ask a question from your phone.

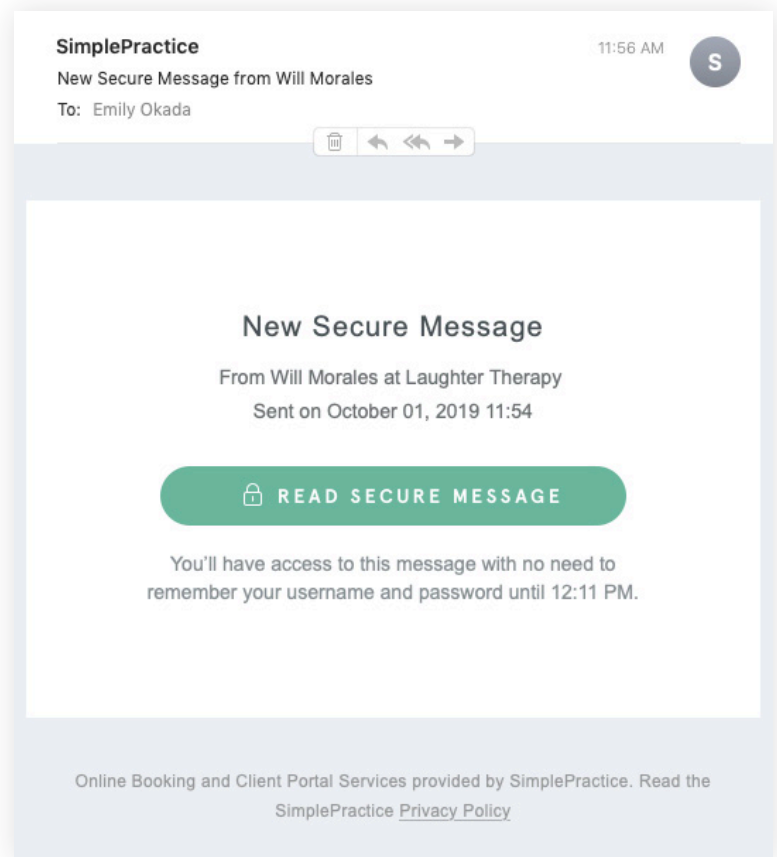
## SECTIONS:

1. Message notifications
2. How to reply

## MESSAGE NOTIFICATIONS

When your clinician sends you a secure message, you'll receive an email that looks like this:

1. Click on the **Read Secure Message** button to access your message. Your link will be **active for 15 minutes** from the time the email is sent. During this time, you can view your message directly after you click the link.
2. Clicking the link will **open the messaging widget in your default browser**. You can then send messages directly from there. This works the same way whether you're on your computer or your mobile device.



**NOTE:** After 15 minutes, you'll have to enter your Client Portal username and password to log in and view your message.

## HOW TO REPLY

Start typing your message in the box that says "Send a message," then hit Send when you're ready.

The screenshot displays the Laughter Therapy client portal. At the top, the header includes the text "Laughter Therapy" and a "Sign Out" button with a speech bubble icon. Below the header are navigation tabs for "Appointments", "Documents", and "Billing & Payments". The main content area shows an "Appointment" card for "Will Morales" on "Oct 07, 2019" from "12:45 PM—2:15 PM UTC" at "11801 Mississippi Ave, 90025, CA 90025". The card includes an "Add to Calendar" button and a "Cancel" button. A "New appointment?" button is also visible. Overlaid on the right is a secure messaging window titled "Will Morales". The message history shows a grey bubble from "WM" saying "Hi Emily, I'm looking forward to our session on October 7 at 12:45PM. Please familiarize yourself with the Client Portal and fill out all your Demographics information before we meet." and three blue bubbles from the user replying "Thank you!", "I'll make sure to do that", and "See you soon." (marked as "Delivered"). A second grey bubble from "WM" says "Great! Thanks". At the bottom of the messaging window is a text input field labeled "Send a message" and a tip: "Tip: to add space between lines, use Shift + Enter".

You can check your messages or send new ones at any time by logging into the Client Portal. Once you log into the portal, just click on the **Secure Message icon** to view your message. The **orange dot** indicates a new message is waiting.

This screenshot shows the top portion of the Laughter Therapy client portal. The header features "Laughter Therapy" on the left and a "Sign Out" button with a speech bubble icon on the right. Below the header are navigation tabs for "Appointments", "Documents", and "Billing & Payments". On the far right, there is a "Request Appointment" button with a calendar icon.



**Congratulations!**

You're now ready to start using Secure Messaging.

# How to Request Appointments

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Online Booking lets you request, cancel, or reschedule appointments with your clinician.

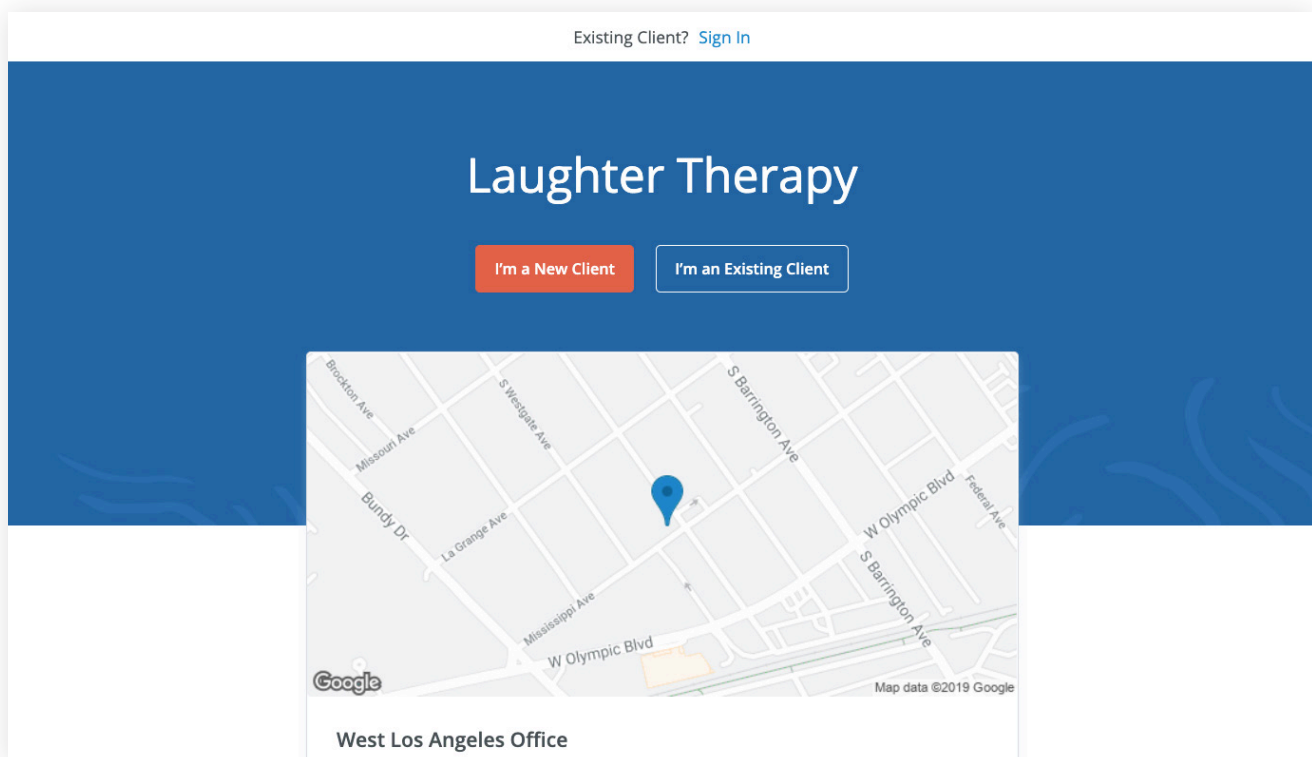
**SECTIONS:**

1. Request a session
2. Cancelling requests

## REQUEST A SESSION

The following steps will show you how to request appointments.

1. Go to your clinician's **Client Portal** and click **Existing Client** to log in. (The New Client button is only for clients who have never logged into the Client Portal before).



2. Navigate to the **Appointments tab** (This may already be selected by default).



3. Select your **clinician** (if there are multiples).

Laughter Therapy

Existing client? [Sign In](#)

### Request an appointment

- 1 Choose Clinician
- 2 Select Service
- 3 Select Location
- 4 Select Date & Time
- 5 Your Information

Will Morales	Select
Jaime Thomas	Select
Jeremy Abbey	Select

4. Select your **service**. What type of appointments do you see your clinician for?

Laughter Therapy

Existing client? [Sign In](#)

### Request an appointment

- ✓ Clinician  
Will Morales
- 2 Select Service
- 3 Select Location
- 4 Select Date & Time
- 5 Your Information

90 Minute Session 1 hour, 30 minutes	Select
Psychotherapy, 45 min 45 minutes	Select

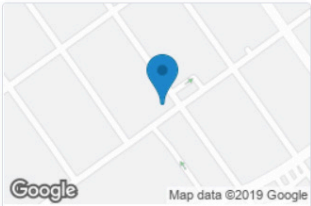
5. Choose your **office location** (there may only be one to select from, as shown below)

## Laughter Therapy

Existing client? [Sign In](#)

### Request an appointment

- ✓ Clinician  
Will Morales
- ✓ Service  
90 Minute Session  
1 hour, 30 minutes
- 3 Select Location**
- 4 Select Date & Time
- 5 Your Information



**West Los Angeles Office**  
11801 Mississippi Ave  
90025, CA 90025  
(123) 123-1212

Select

6. Click on the **date and time** that you'd like.

## Laughter Therapy

Existing client? [Sign In](#)

### Request an appointment

- ✓ Clinician  
Will Morales
- ✓ Service  
90 Minute Session  
1 hour, 30 minutes
- ✓ Location  
West Los Angeles Office  
11801 Mississippi Ave  
90025, CA 90025  
(123) 123-1212
- ✓ Date & time  
Mon, Sep 30, 2019  
10:30 AM - 12:00 PM  
PDT
- 5 Your Information

September 2019

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	★ Today	28
29	<b>30</b>	1	2	3	4	5

Availability on Mon, Sep 30, 2019  
Viewing in PDT [Change](#)

Morning	Afternoon	Evening
10:00 AM	12:00 PM	--
10:15 AM	12:15 PM	--
10:30 AM	12:30 PM	--
10:45 AM	12:45 PM	--
11:00 AM	1:00 PM	--
11:15 AM	1:15 PM	--
More Times	More Times	

Show availability for:

- Mornings Before 12pm
- Afternoons 12pm - 4pm

7. Your appointment request has been **sent** to your clinician (Your clinician will need to accept your request).

You can click to view a map of the office location, or add the session to your calendar.

## Thank you, Alice!


We will send you a confirmation after your appointment has been confirmed.

**When**  
Mon, Sep 30, 2019  
11:15 AM - 12:45 PM  
PDT

**With**  
Will Morales

**What**  
90 Minute Session

**Where**  
West Los Angeles Office  
[11801 Mississippi Ave](#)  
[90025, CA 90025](#)  
(123) 123-1212



**Add to Calendar**

[Google](#) [Apple](#) [Outlook](#)

[Cancel Appointment](#)

8. If your request is accepted, you'll receive an **email** confirming the session.

9. If they cannot see you at that time, you'll receive a link to reschedule. Click it to go back to your Client Portal and request a new session.

## Appointments

New appointment? [Request Now](#)

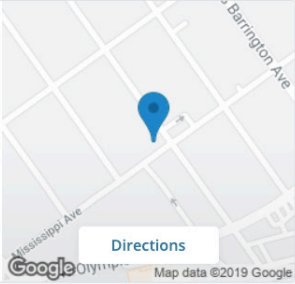
UpcomingRequested

Sep 30, 2019  
11:15 AM—12:45 PM UTC

Will Morales

11801 Mississippi Ave  
90025, CA 90025

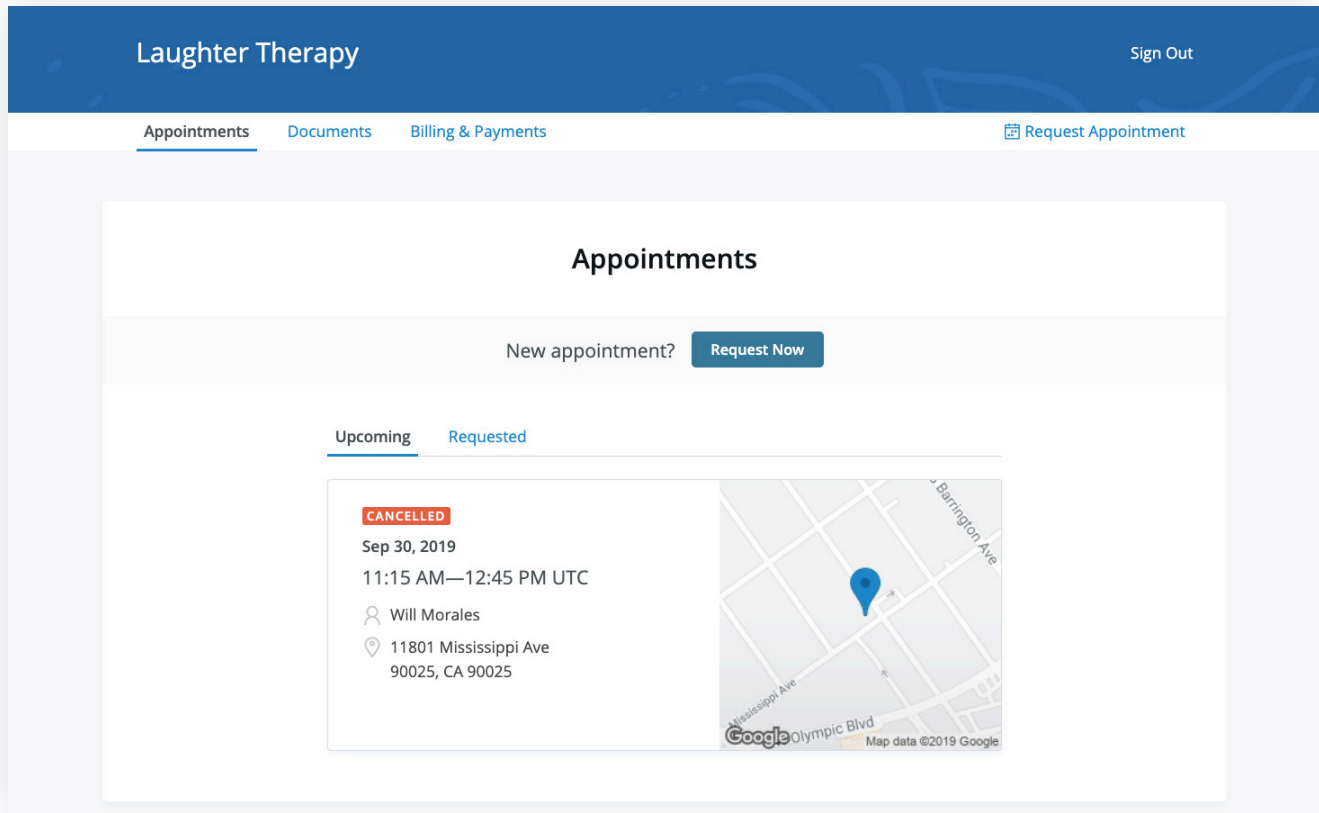
[Add to Calendar](#) [Cancel](#)



[Directions](#)

## VIEWING AND CANCELLING REQUESTS

You'll see a list of your upcoming requests and confirmed or denied appointments on the appointments page of your client portal. Click **Cancel Session** to cancel your appointment request.



The screenshot shows the 'Laughter Therapy' client portal. At the top, there is a blue header with 'Laughter Therapy' on the left and 'Sign Out' on the right. Below the header is a navigation bar with 'Appointments' (underlined), 'Documents', 'Billing & Payments', and 'Request Appointment' (with a calendar icon). The main content area is titled 'Appointments' and features a 'New appointment?' prompt with a 'Request Now' button. Below this, there are two tabs: 'Upcoming' (selected) and 'Requested'. A single appointment card is displayed under the 'Upcoming' tab. The card has a red 'CANCELLED' label at the top. The appointment details are: 'Sep 30, 2019', '11:15 AM—12:45 PM UTC', 'Will Morales' (with a person icon), and '11801 Mississippi Ave, 90025, CA 90025' (with a location pin icon). To the right of the text is a small map showing the location on a street grid, with a blue location pin. The map includes labels for 'Mississippi Ave', 'Barrington Ave', and 'Olympic Blvd', and a 'Google' logo. At the bottom of the map, it says 'Map data ©2019 Google'.

**NOTE:** You'll only be able to cancel this way according to your clinician's cancellation policy. If you attempt to cancel too close to a session, or if they don't offer online cancellation, you'll receive a message to call their office to cancel.

Once your session is cancelled, you'll see this reflected on your **Appointments tab** in the Client Portal. Use this page to **check the status of your requests, cancel sessions, or schedule new ones!**



**Congratulations!**

You're now ready to start booking appointments in your Client Portal.

# How to Pay Your Bills

with  simplepractice

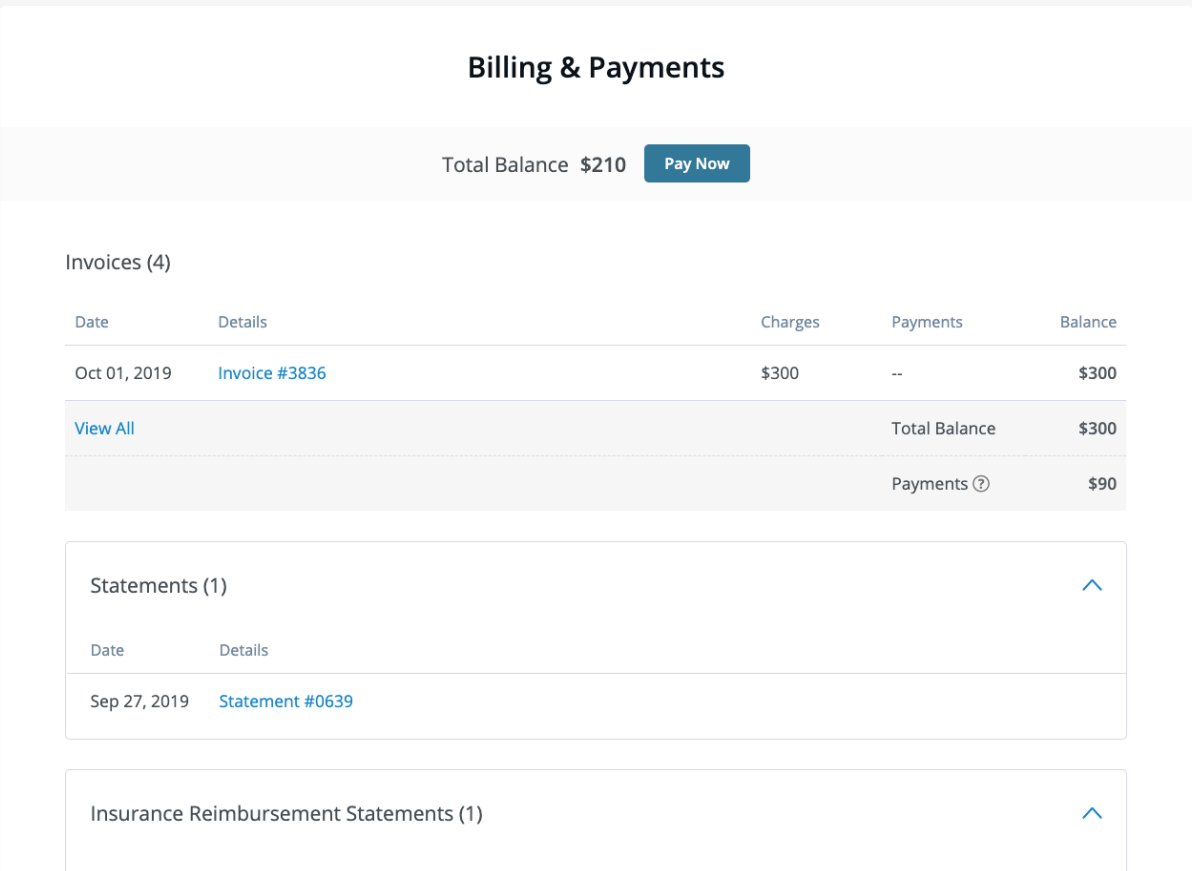
Using the Client Portal, you can view your recent invoices, statements, superbills, and payments. You can also add a credit card and pay for your sessions.

## SECTIONS:

1. Viewing your billing history and documents
2. Making payments

## VIEWING YOUR BILLING HISTORY AND DOCUMENTS

1. After logging into the Client Portal, click **Billing & Payments** to see your billing page. This page provides you with an overview of your recent payment history and access to your billing documents.
2. You'll see three sections for **Invoices**, **Statements**, and **Insurance Reimbursement Statements** (superbills).



**Billing & Payments**

Total Balance \$210 [Pay Now](#)

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	<a href="#">Invoice #3836</a>	\$300	--	\$300
<a href="#">View All</a>			Total Balance	\$300
			Payments	\$90

Statements (1) [^](#)

Date	Details
Sep 27, 2019	<a href="#">Statement #0639</a>

Insurance Reimbursement Statements (1) [^](#)



3. At the very bottom there's a section for **Account History** that shows your most recent sessions and payments.

Account History <span style="float: right;">^</span>				
Date Range: All Time				
Date	Type	Charges	Payments	Balance
Oct 01, 2019	<a href="#">Invoice #3836</a>	\$300	--	\$210
Oct 01, 2019	<a href="#">Invoice #3835</a> <span style="background-color: #28a745; color: white; padding: 2px;">PAID</span>	CR \$90	--	CR \$90
Oct 01, 2019	<a href="#">Invoice #3834</a> <span style="background-color: #28a745; color: white; padding: 2px;">PAID</span>	\$30	--	\$0
Oct 01, 2019	Cash payment	--	(\$30)	CR \$30
Sep 27, 2019	<a href="#">Invoice #3832</a> <span style="background-color: #28a745; color: white; padding: 2px;">PAID</span>	\$150	--	\$0
Sep 27, 2019	Cash payment	--	(\$150)	CR \$150

4. Adjust the **date range** to display whichever sessions you'd like by clicking the calendar icon.

Account History <span style="float: right;">^</span>																																																																																										
09/02/2019 - 10/01/2019																																																																																										
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <span>All Time</span> <span>Last 30 days</span> <span>This Month</span> <span>Last Month</span> <span>This Year</span> <span>Last Year</span> </div> <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>&lt;&lt;</span> <span>September</span> <span>October</span> <span>&gt;&gt;</span> </div> <table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <thead> <tr> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> </tr> </thead> <tbody> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> </tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td> <td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td> </tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td> <td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td> </tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td> <td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td> </tr> <tr> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> <td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td> </tr> </tbody> </table> </div> </div>					Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	1	2	3	4	5	6	7	29	30	1	2	3	4	5	8	9	10	11	12	13	14	6	7	8	9	10	11	12	15	16	17	18	19	20	21	13	14	15	16	17	18	19	22	23	24	25	26	27	28	20	21	22	23	24	25	26	29	30	1	2	3	4	5	27	28	29	30	31	1	2	Payments	Balance
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat																																																																													
1	2	3	4	5	6	7	29	30	1	2	3	4	5																																																																													
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22	23	24	25	26	27	28	20	21	22	23	24	25	26																																																																													
29	30	1	2	3	4	5	27	28	29	30	31	1	2																																																																													
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Sep 27, 2019	Cash payment	--	(\$150)	CR \$150																																																																																						

**TIP:** Once you open a document, you can click Print to print it or Download PDF to download it to your computer.

✕ **Statement for Insurance Reimbursement #0730** Download Print  
Emily Okada

From **Laughter Therapy**  
11801 Mississippi Ave  
90025, CA 90025

**Statement for Insurance Reimbursement**

To **Emily Okada**

## MAKING PAYMENTS

It's easy to pay your bills in the Client Portal and stay on top of your payment history. Your **current balance** displays at the top of the page. You can either pay this entire balance, or pay a specific invoice.

1. To pay your entire balance, click **Pay Now** next to the balance amount.

**Laughter Therapy** Sign Out

[Appointments](#) [Documents](#) [Billing & Payments](#) [Request Appointment](#)

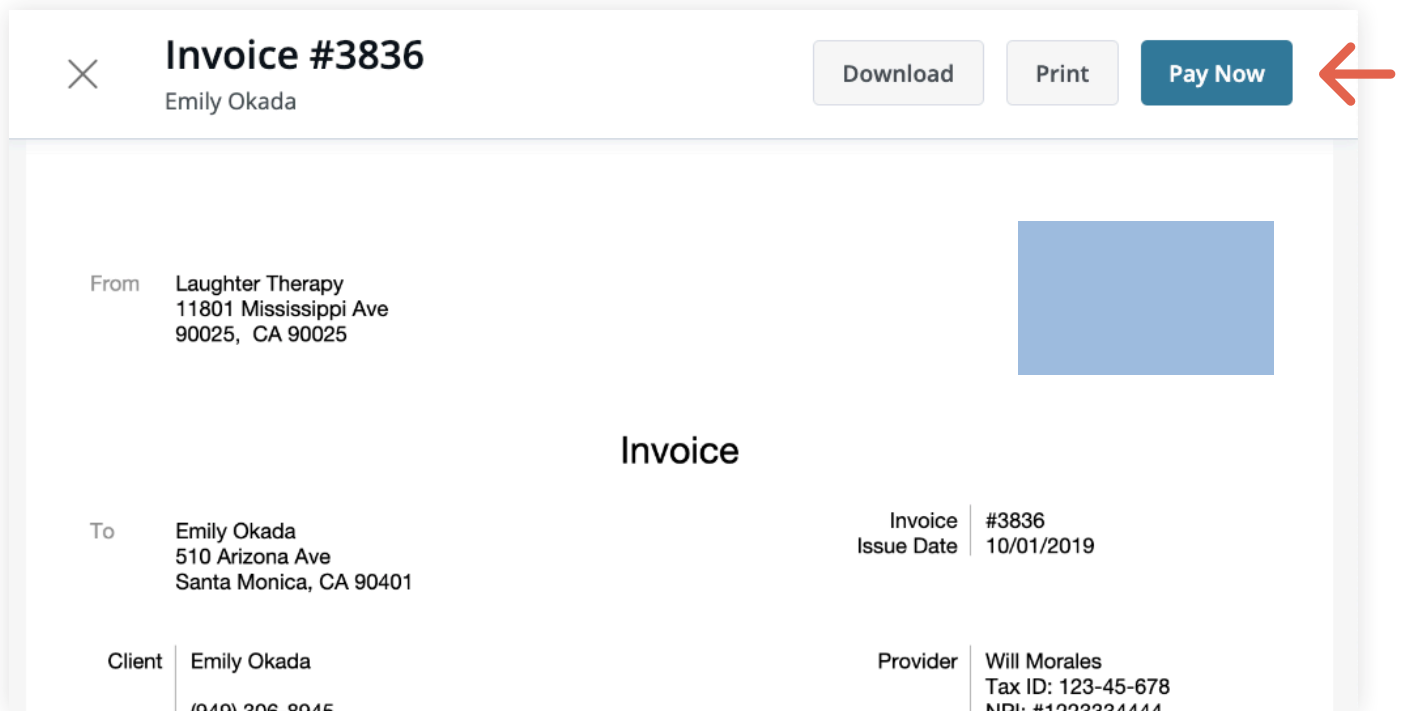
### Billing & Payments

Total Balance \$210 Pay Now ←

Invoices (4)

Date	Details	Charges	Payments	Balance
Oct 01, 2019	<a href="#">Invoice #3836</a>	\$300	--	\$300
<a href="#">View All</a>			Total Balance	\$300
			Payments ⓘ	\$90

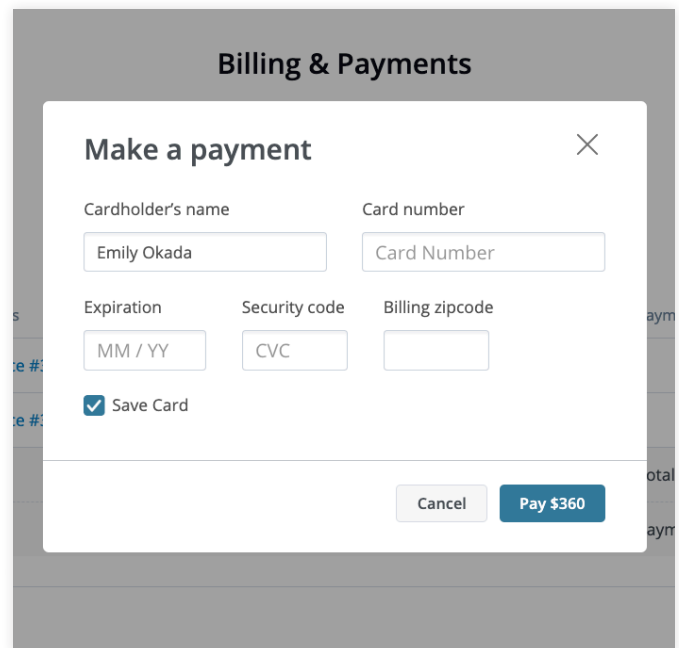
2. To pay a specific invoice, **open the invoice** and click **Pay Now** at the top.



No matter which pay button you choose, the next steps are the same:

1. Enter the cardholder's name, card info, and billing zipcode.
2. If you'd like to store this card to use in the future, check the **Save Card** box.
3. The amount on the **Pay** button will reflect the payment that you're making. Make sure it's the correct amount, then click Pay \$(amount).
4. You'll see that the status next to that invoice date in your **Account History** section has changed to **Paid**.

If you stored the card, you'll be able to select this card for future payments.



**Congratulations!**

You're now ready to start managing billing in your Client Portal.